

USPTO PATENT FULL-TEXT AND IMAGE DATABASE[Home](#)[Quick](#)[Advanced](#)[Pat Num](#)[Help](#)[Bottom](#)[View Cart](#)*Searching 1976 to present...***Results of Search in 1976 to present db for:****(((((CCL/705/\$ AND "financial advisor") AND portfolio) AND suggest\$) AND chang\$) AND evaluat\$): 6 patents.****Hits 1 through 6 out of 6**[Jump To](#)[Refine Search](#)

ccl/705/\$ and "financial advisor" and portfolio and suggest\$ and chang\$ and evaluat\$

PAT. NO. Title

1 [6,370,516](#) **Computer based device to report the results of codified methodologies of financial advisors applied to a single security or element**

2 [6,349,290](#) **Automated system and method for customized and personalized presentation of products and services of a financial institution**

3 [6,240,399](#) **System and method for optimizing investment location**

4 [6,064,986](#) **Computer assisted and/or implemented process and architecture for customer account creation, maintenance and administration for an investment and/or retirement program**

5 [6,021,397](#) **Financial advisory system**

6 [5,918,217](#) **User interface for a financial advisory system**

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